DED Business Application Review Kaizen Event Report Out

"Core Application" Team

September 20-24, 2010

The Opportunity

Teresa Hay McMahon

The "Core Application" Team
Beth Balzer

Team Members

Beth Balzer

Team leader	**Lisa Michaelson, DHS**
Facilitator	**Mike Rohlf-IDED**
Members	**Jeremy Babcock, IDED**
	Michael Farley, IDED
	Pat Paustian, IDED
	Wynona Bohemann, IDED
	Vicky Winter-Clearman, IDED
	Beth Balzer, IDED
	Teresa Lane, IDED
	Allen Williams, IDED
	Lane Palmer, IDED
	Paul Stueckradt, IDED
	Eric Shofroth, IDED
	Stacie LoVan, Greater Des Moines Partnership
	Jim Vanderwielen, DPD
	Melissa Pelham, DHS

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Scope
Wynona Bohemann

> ➢ **This event will address the Financial Assistance Application Review process from the time of initial contact with Business Finance for a specific project to when a decision is made.**

Goals
Mike Farley

1. 100% of the applications that are received are complete

2. With improvements, reduce the amount of paper used and produced

3. Reduce the amount of steps it takes in the process by 25%

Objectives
Stacie LoVan

1. Have a more efficient and timely process
2. Eliminate back and forth (communication)
3. Evaluate the tools we use including the PRF, BIRT Form, Electronic Board Book and etc.
4. Examine what we require with and within an application
5. Identify early on the ways we can communicate types and amounts of assistance
6. Remain flexible to special situations and circumstances (20% of time)
7. Free up time to give me time to do other work
8. Better understanding of the whole process
9. Be able to bring new staff into this process easily

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Kaizen Methodology

Melissa Pelham

- ➢ Clear objectives
- ➢ Team process
- ➢ Tight focus on time
- ➢ Quick & simple
- ➢ Necessary resources immediately available
- ➢ Immediate results (new process designed by end of week)
- ➢ 5S "mindset"--use the steps to support the event activities
  - ➢ Sort, Set in order, Shine, Standardize, Sustain

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Current Process

Paul Stueckradt

Results-Old Process

Pat Paustian

Total Steps	197	
Total Delays	12	
Delays BC	4.3 days	
Delay WC	72 days	
Value Added Steps	1	
Decisions	31	
Loop Backs	10	
Total Handoffs	71	
Lead Time - Days	33.5 days	

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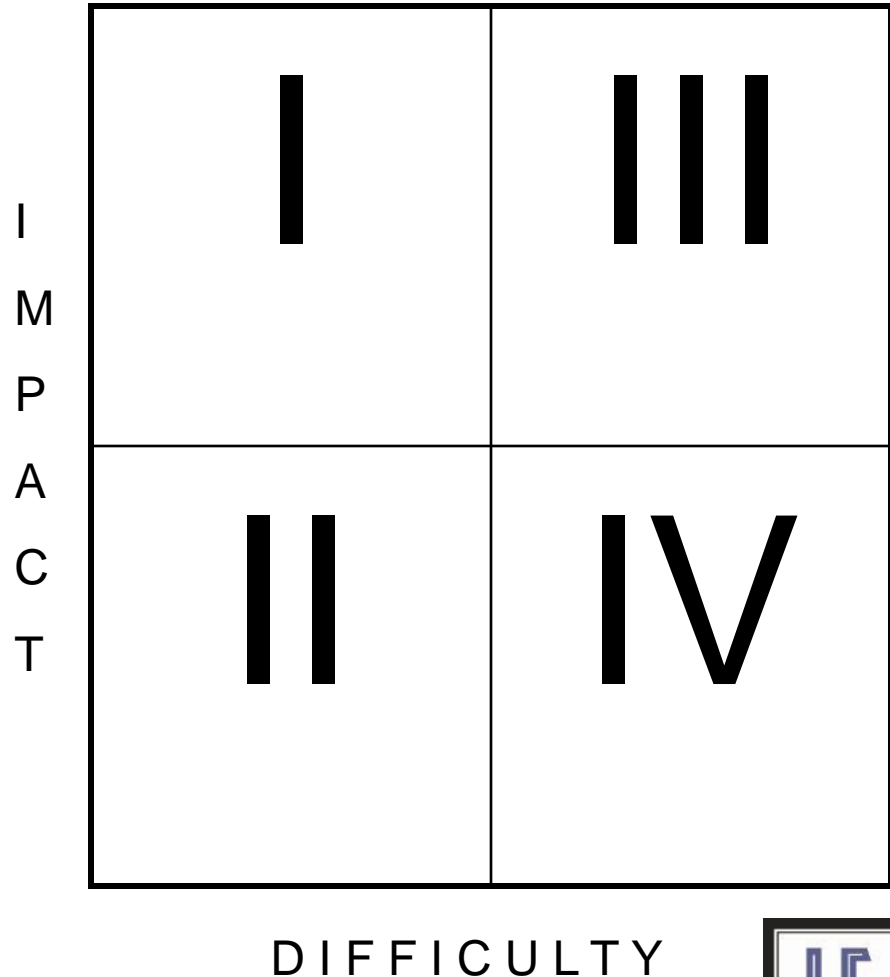Continuous Improvement

Brainstorming
Teresa Lane

➢ Require on-line application

➢ Utilize Shared folders for all application materials

➢ Standard checklist for application review

➢ Design set of questions for cold calls

➢ Utilize electronics (projectors etc.) for meetings to reduce paper

➢ Determine early on the types and amounts of potential assistance

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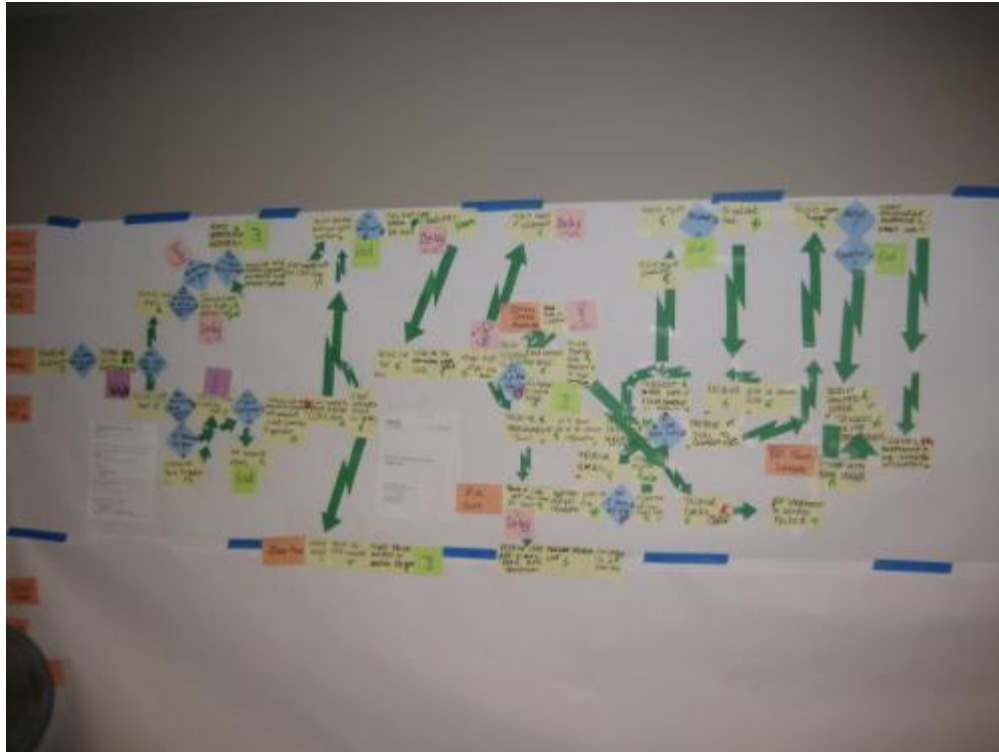
De-selection Process
Allen Williams

- Identifies
  - Impact to customer
  - Difficulty implementing

- Helps to rate/ rank solutions to resolve issues while identifying ease of implementation

I M P A C T

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| II | IV |

D I F F I C U L T Y

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New Process

Jeremy Babcock

Results-New Process

Jim Vanderwielen

	Old	New	% Change
Total Steps	197	137	30%
Delays BC	4.3 days	3.1 days	28%
Delay WC	72 days	36 days	50%
Value Added Steps	1	2	187%
Decisions	31	28	10%
Loop Backs	10	7	30%
Total Handoffs	71	51	28%
Lead Time - Days	33.5 days	27.6 days	20%

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Homework
Lane Palmer

Item	Item Description	Person Responsible	Due Date
1	Guideline for decision process (clarity for financial decision)	Paul	November 30th
2	Emphasis on FIR vs dollar per job	Lane/Paul	November 30th
3	Blue Folder – Needs to go to compliance at some point – who will make the folder?	Teresa	October 21st
4	Map what happens with Tax info	Lane	October 21st
5	Standard check list for application review	Pat	October 30th
6	Give access to Vicki / Debby to shared drive	Paul	September 30, 2010
7	Assess paper use for Director meeting	Teresa	November 30, 2010
8	BF Managers verify the correct document version is in the Board Books	Jeremy	Ongoing
9	Design set of questions for cold call (to direct the call to the right person)	Allen	October 21, 2010
10	Design new review form – Screening Tool- Incentive worksheet	Paul	October 30, 2010

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Team Member Experience

Eric Shofroth
Stacie LoVan

Comments

Lisa Michaelson

Mike Rohlf

We welcome your questions and comments!